



Hello, I'm James and I am the...

# Finance Automation Lead

May also be known as: Operational Excellence Lead or RPA Manager

I am an expert in using automation tools and techniques along with the knowledge in the domain of finance processes. My goal is to enable automation of processes and eliminate manual tasks where possible. It is my dream to bring my organisation's finance operations to a new level.

## WHO AM I

### James Finance Automation Lead

"As a Finance Automation Lead, I am the brains of automating finance processes to help the finance function achieve greater efficiency. I spent most of my time working closely with finance process owners to translate manual tasks into automated processes, relieving capacity for these finance experts to take on more analytical work. I am excited about the use of automation in different areas. I have the help of project managers to keep the projects on track so I can focus on developing the automation together with my team of developers or automation experts. I am constantly aware of developments in the market for automations and its related approaches and tools."

## MY ROLE

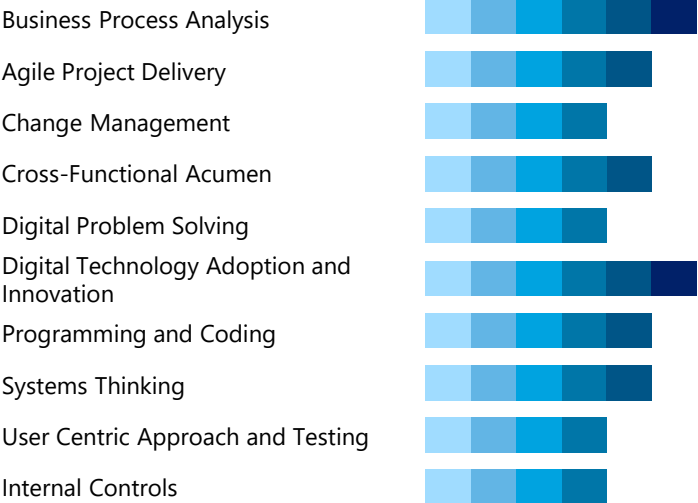
To be a Finance Automation Lead, I need to have:

- Knowledge of automation tools and solutions with an understanding of Finance operations
- Experience in programming, application development and implementation work

The responsibilities of my job includes:

- Identify opportunities and drive automation of processes in finance function by assessing ROI, automation tools and approach
- Organise workshops to gather requirements and map business processes for automation
- Develop proof of concept and demonstrate RPA capabilities to garner project support for automation
- Work with finance process owners and IT to implement automations as per organisation's standards for automations.
- Perform end-to-end testing, troubleshooting and end-user education and support
- Maintain documentation of automations and support operational issues after go-live
- Stay updated on automation tools and solutions in the market

## MY SKILLS



## DAY IN MY LIFE

- 9:00 • Meet with project manager, process owners and other developers of Project A for **daily scrum meeting to run through the progress against Sprint Goal and adapt the Sprint Backlog as necessary**
- 10:00 • Schedule meeting with other **developers or automation experts to discuss roadblocks in development of automation project A and next steps going forward.**
- 11:00 • Attend meeting with finance representatives to understand **new areas of finance process that can be potentially automated.**
- 1:00 • Work on **proof of concept for new project B that can potentially automate finance process and prepare business case** for project initiation. Further queries are raised to the finance process owners.
- 3:00 • Continue to work on **development of automation for project A which is ongoing.** Check to ensure that **work has been documented in a centralised project documentation.**
- 5:00 • **Support user queries and issues** from automation that has been implemented

## MY TOOLBOX



**Robotic Process Automation (RPA) tools** are technologies that can mimic how end users interacts with applications to perform repeatable and high-volume tasks. RPA tools can be software programs or bots that can access applications to enter data, complete tasks, and copy information between different applications.



**Business Process Management (BPM) tools** contain human task management, workflow and collaboration functionalities to enable various users and project teams to collaborate, track and manage tasks and workflows to achieve business outcomes. BPM solutions are typically self-service, enabling users to raise cases and incidents directly, with more advanced BPM tools powered by AI-driven chatbots to identify and triage critical incidents and escalate as appropriate